

TERMS OF BUSINESS

Non-standard fee addendum form

Non-standard fee cases

Usually, our fees are paid in accordance with those set out in our Terms of Business. However, in some circumstances, it may be more appropriate to pay our fees using an alternative fee structure, so that we can offer flexibility to meet your needs. This may be, for example, due to the complexity of the advice you need, or where you require a service outside of our standard services. It may also be for existing clients who need 'ad hoc' advice as they are not receiving an 'ongoing service' from us.

Where this is the case, we will always agree the fee and fee structure to be used before we carry out any work for you. We will only agree to work on alternative fees structures in circumstances where this will continue to offer fair value to you.

Following our discussions with you, we have agreed that a non-standard fee is appropriate for to the services that we will provide to you.

The advice fees associated with your investment service:

Financial Review - A documented review of current arrangements in relation to your objectives, orientated to meet a particular need (such as retirement income) with generic recommendations and correct annual allowance position using verified information from your payslips and service history. If no further work is undertaken leading to an actual investment; it is likely that VAT is due on these fees.

£2,500

Basic Financial Review - A simple documented review of current arrangements in relation to your objectives, orientated to meet a particular need (such as retirement income) with generic recommendations and annual allowance position using the source data provided to us by the NHS. If no further work is undertaken leading to an actual investment; it is likely that VAT is due on these fees.

£1,250

Lasting Powers of Attorney - A lasting power of attorney is a legal document that appoints someone to manage your affairs in the event you are no longer able to do so. There are two types of lasting power of attorney, health and welfare, and property and financial affairs. Medical Family Finance can help you to complete your lasting powers of attorney applications. We will send you the relevant form to complete online, check the details are correct and finalise the form before asking you to sign it. We will then submit the lasting power of attorney to the Office of the Public Guardian for registration.

**£250 per type
plus
£92 set fee the Office of the
Public Guardian charges**

VAT - The fees set out above do not include VAT. If VAT does apply it will be charged on top of the stated fee. The law on which services are and are not subject to VAT may change in the future.